PLANVIEW PPM PRO – PRODUCT ROADMAP Q3 2022

Thanks for joining! We'll start 1 minute after the bottom of the hour.

PLANVIEW PPM PRO – PRODUCT ROADMAP Q3 2022

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Housekeeping Items

- 30-35 minutes of presentation

- Remainder Q&A

- All lines are on mute

- Enter questions into the Q&A box
  - If you can't see the chat box, click Q&A at the bottom right of the Zoom window

- Webinar is being recorded

- Recording and slides will be shared

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Disclaimer

- The Roadmap represents the current state of planning, is provided for illustrative purposes only, and can be changed by Planview without notice.

- This presentation and Planview's strategy and possible future developments are subject to change and may be changed by Planview at any time for any reason without notice.

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Building the Future of Connected Work

Strategy

Planning

Delivery

Results

Focus on **what matters most**

&

Empower teams to do their **best work**

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The Planview Platform

STRATEGY

Objectives and Key Results	
Innovation Management	Initiative Planning

PLANNING

Strategic Portfolio Management	Product Development	Project Portfolio Management	Enterprise Agile Planning	Professional Services Automation

Funding and Capacity Planning

Enterprise Architecture Management

DELIVERY

Program Management	Resource Management	Work Management	Team Delivery

RESULTS

Outcome Realization	
Benefits Realization	Billing and Revenue Recognition

ANALYTICS & REPORTING

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Q322+ Roadmap Focus

- **Projectplace Integration v2 (beta)**
- **Timesheet Summary report**
- Notification Service (Alerts 2.0)
- OData Revamp
- Reorder Project Sections*
- 1-n Additional Details Project Sections*
- Audit History report

- Rich text/image content for dashboards
- User/Group/Unit Field Restrictions*
- Dependent Field Logic
- Resource SSA
- Staffing SSA (revamp)*
- Spreadsheet Editor – SSA Entities*
- Archiving Projects*
- Push Sandbox to Production*

* Customer Spigit challenge winner

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Projectplace v2 Integration

- WBS tasks-activities controlled from *either* solution (can toggle control)

- Cards synced but controlled from Projectplace

Timesheet Summary Report

Will be similar to Legacy Report

All Timesheet Entries Summarized…		▼ ✕
Resource	**Project**	**Total Hours**
Cabrero, Filipe	CRM Implementation v3	4.00
Cabrero, Filipe	Increase Machine Inspections!	30.00
Belton, Gary	Pack and Ship Services	12.00
Christianson, Susanna	CRM Implementation v3	8.00
Kukreja, Samir	CSM Initiative	12.00
Megel, Eric	Mobile Marketplace Upgrade	88.00
Cabrero, Filipe	CSM Initiative	5.00
Cabrero, Filipe	Increase Machine Inspections!	29.00
Cabrero, Filipe	Merger - People, Process, Technology	50.00
Belton, Gary	Increase Machine Inspections!	5.00
Shaughn, Jorge	Mobile Application Project	16.00
Cabrero, Filipe	Funtastic Timeline	4.00
Cabrero, Filipe	Increase Machine Inspections!	10.00
Kukreja, Samir	Increase Machine Inspections!	0.00
Laird, Peter	WAN Project	20.00
Kukreja, Samir	Increase Machine Inspections!	20.00

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Planview Platform – Notification Service

- Easier, centralized management of alerts

- Agnostic: email, browser notifications, other bots/apps

- Customizable triggers

- Advanced logic

- Alert resolution
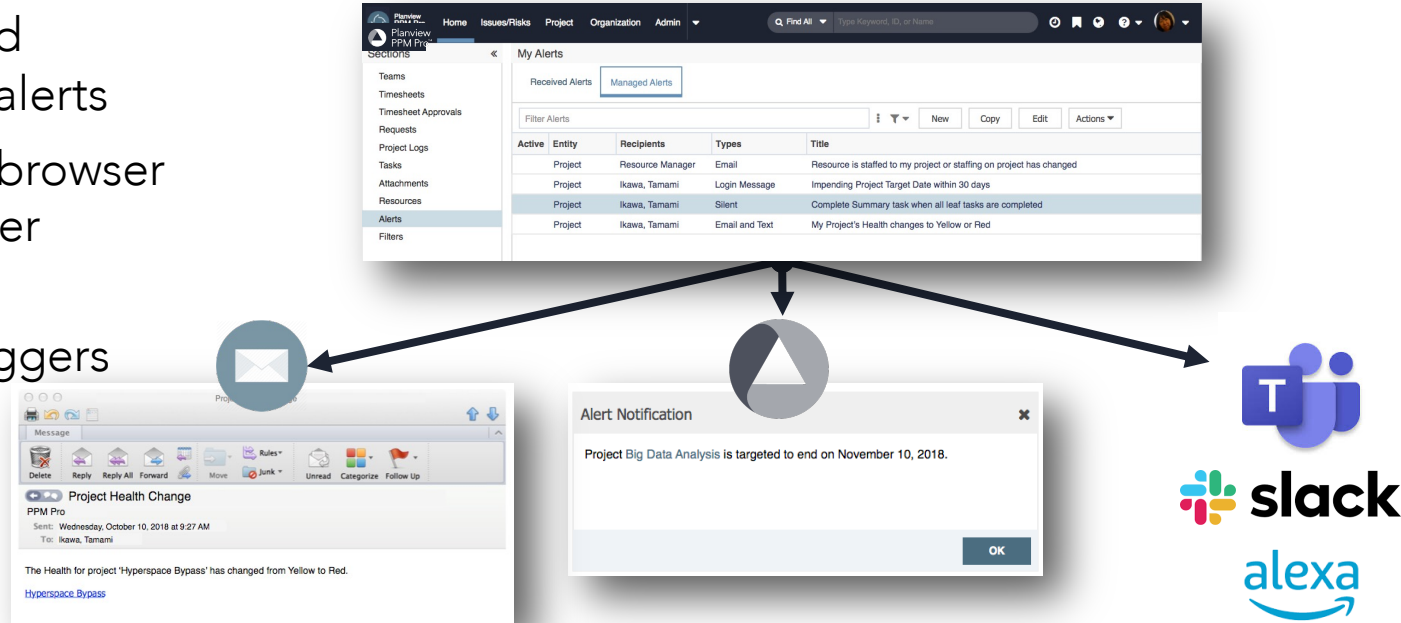
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Reorder & 1-n Additional Project Sections

- Have 1-n Additional Details sections per project category
- Reorder these and other project sections per project category

OData Revamp

- New UI for identifying fields for OData feed
- Increase access to more than once a day/as needed
- Improve performance and data extraction size
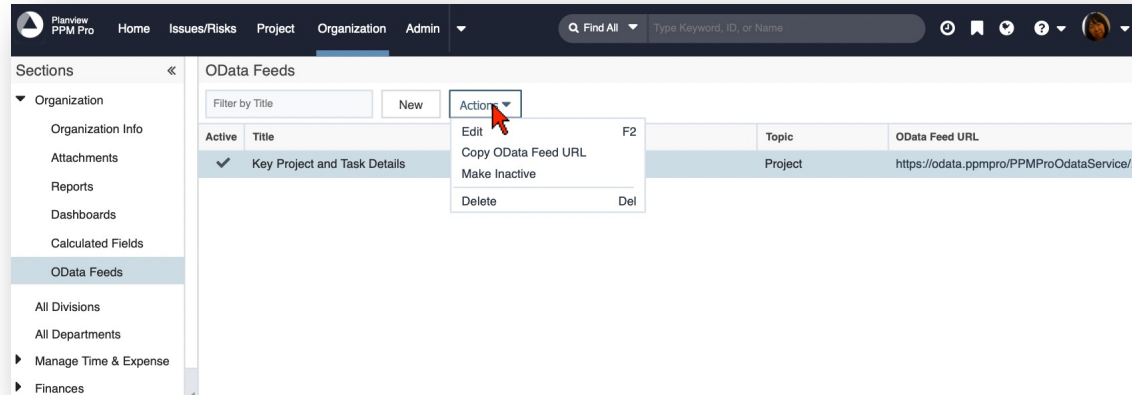
New Dashboard Rich Text/Image Content

Include rich text and image content in multiple places of a dashboard for:

- Company logos
- Descriptive text
- Links
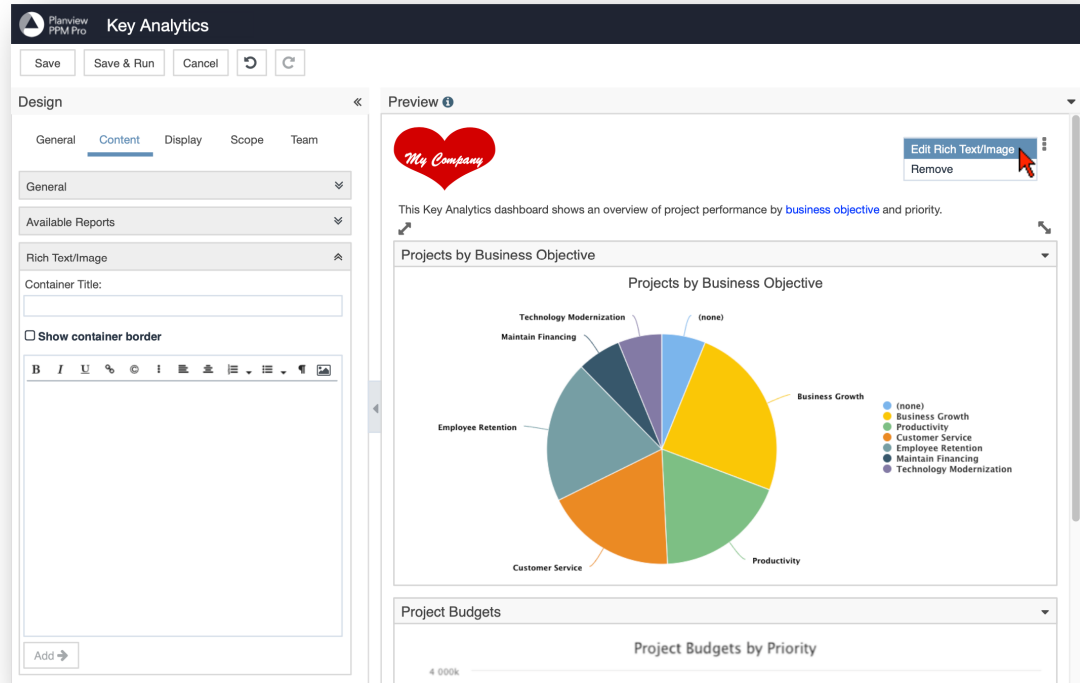
Audit History Report

Goes beyond Legacy report:
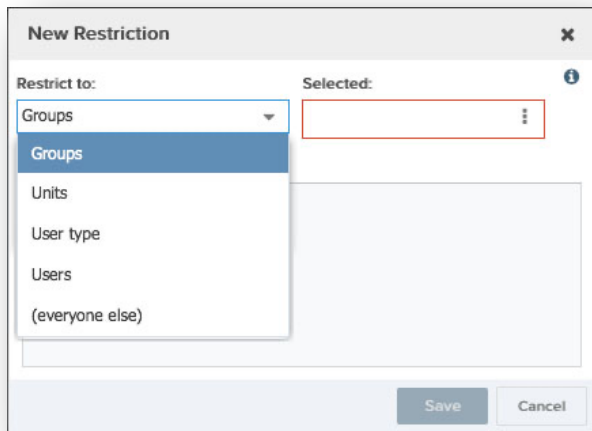
- Include "today" in results

- Increase allowed number of "Previous <n> days"

- Stretch goal: Additional Request and Staffing topics

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User/Group/Unit Field Restrictions

Add Users, Groups, and Units to the "Restrict to" field

Dependent Field Logic

Based on another field's value or other property

- Filter lookup list options
- Hide/show other fields
- Set a value on another field
- Make another field required
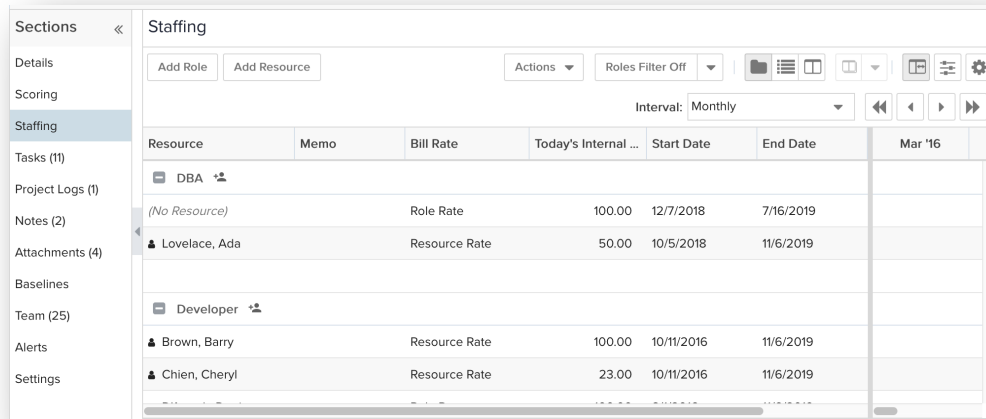
Resource SSA (Self-Service Admin)

- Admin configurable entity
- Profile-based Permissions
- Standard groups (such as Organization, Resource) converted to permission profiles

Staffing SSA (Revamp)

- Grid column config
- Explicit Group By
- Ad hoc filter
- Bulk edit
- Potentially:
  - Show actuals option
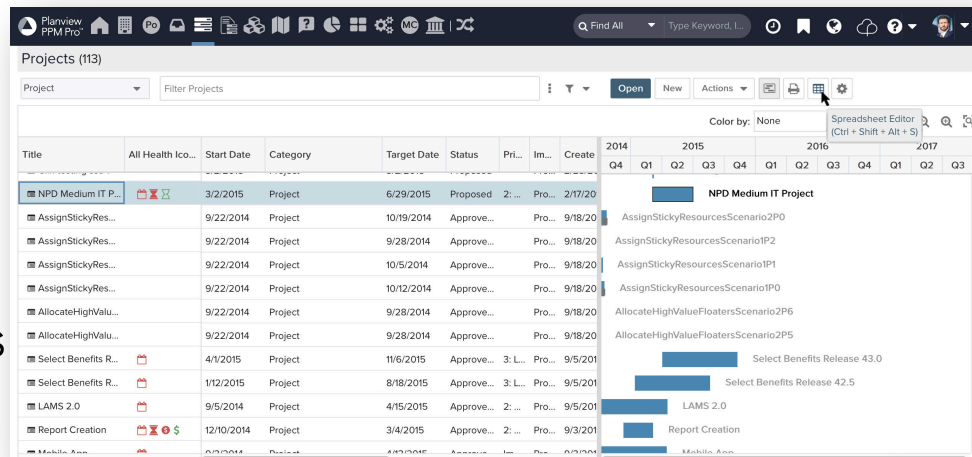 - Resource Workbench resource utilization view option

Spreadsheet Editor – SSA Entities

For remaining Self Service Admin entities (Project Logs, Projects, and so on):

- Spreadsheet-style keyboard interaction

- Undo/Redo

- Copy/paste to and from other spreadsheet tools

- Text box editing
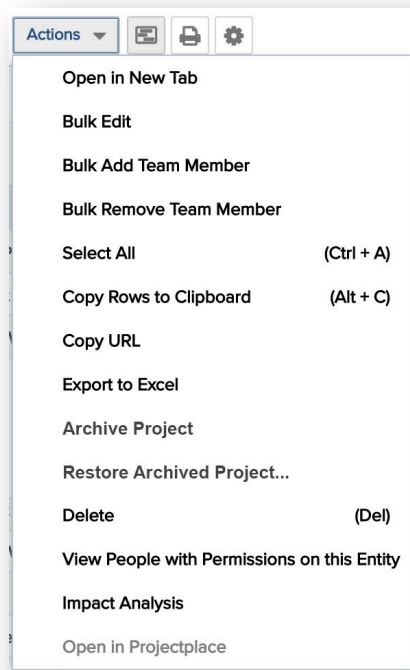
- Does not include entity contours

Archiving Projects

- "Archive Project" option:
  - Removes project and its child entities (tasks, project logs, and so on) from all views, portfolios, associations, filters, pick lists, and other general access
  - Timesheet data remains but is no longer linked to anything
  - Remaining resource demand not included in capacity/demand analyses
- "Restore Archived Project…" option
- Permissions for archiving and restoring archived projects

Actions ▾			
Open in New Tab			
Bulk Edit			
Bulk Add Team Member			
Bulk Remove Team Member			
Select All		(Ctrl + A)	
Copy Rows to Clipboard		(Alt + C)	
Copy URL			
Export to Excel			
Archive Project			
Restore Archived Project…			
Delete		(Del)	
View People with Permissions on this Entity			
Impact Analysis			
Open in Projectplace			

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Push Sandbox to Production

Transfer process and structural changes from the Sandbox into Production, TBD *what* but could be:

- Reports (**Done!** Upload/Download)

- Dashboards

- Portfolios

- Request categories

- Calculated fields

- Admin items such as Permission Profiles, Lookup Lists, and others

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THANK YOU

THANK YOU

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